

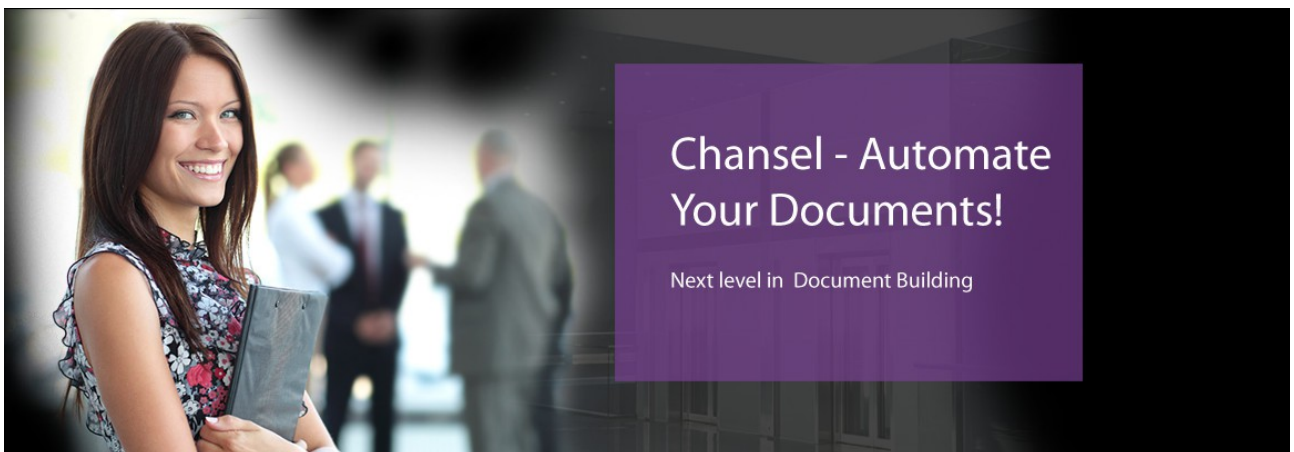


Chansel

Automate Your Documents

Manual
and
Step by Step Guide

Version 1.1



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1 Introduction

Chansel™ is document automation software that helps you run your office smoother. If you're regularly creating documents that are broadly similar to one another:

- Contracts
- Flyers
- Sales agreements
- Real Estate documents
- Employment agreements

In fact any type of legal or contractual documents — then Chansel document creation software will:

- Save you money
- Save your time and resources
- Reduce errors
- Assist you in providing better service to your clients
- Reduce Stress on yourself and staff

Chansel takes away all the fiddly (and risky) copy/pasting that's associated with manually creating contracts, agreements and documents — automating the process in a simple, user-friendly way. Anyone can use it - Chansel works right out of the box. This quick and easy guide and step-by-step tutorial will have you up and running in no time. No steep learning curve. No scripting. No need for specialist IT people.

As well as Document Automation features, Chansel also has a handy documents explorer and search engine, which is described in the Chansel Search User Manual.

2 Step By Step Guide

2.1 How does Chansel Work?

2.1.1 Key Steps

The key steps are:

1. Type tags in your document for elements that you want to change.
2. Use Chansel to define re-usable tag-replacement text(s).
3. Use Chansel to replace the tags.
4. Save the result to a new document.

So let's get Started!

2.1.2 Starting Document

For this step-by-step guide we will use a snippet from an imaginary Estate Agent flyer for a



property. The Estate agent wished to create multiple flyers but does not want to spend all day copying and pasting. So let's automate! The example below will show principles that can apply to all kinds of documents. The document we want to automate for this tutorial can contain all kinds of formatting and pictures, but we will keep things simple for the tutorial and not include images.

For our tutorial, the document will contain this content, once it is completed:

Original Document:

Bellview is an historic and wonderful cottage. The cottage has a luxury kitchen / dining room with appliances, study, bathroom with a bath and shower cubicle, burglar alarm system, gas central heating and a large gardens.

£965,000

For enquiries please contact

Abcd Estate Agents

77 Elmtree lane, Bournville, Berkshire, BV2 9ZZ

(01234) 567891 Email: info@abcd-estate-agents.com

2.1.3 Tagged Document

The next step is to create a version of the “Original Document”, above, but with as much or as little of the text as you like replaced by “Tags”.

To identify candidate tags, first identify text snippets of the document that are shared across different documents, or that you think are generic or important. If you change your mind, it's no problem, you can always re-edit in your word processor.

We will replace tags with text using Chansel. For example, we will use Chansel to replace the `[[property type]]` tag with this text: “cottage”. Here is a list of tags we have decided to use. Different documents may have the same tags and each tag can be replaced (using Chansel) by the same or different replacement text in each document.

Tag	Example Replacement Text
<code>[[property name]]</code>	Bellview
<code>[[features]]</code>	a luxury kitchen / dining room with appliances, study, bathroom with a bath and shower cubicle, burglar alarm system, gas central heating and a large gardens
<code>[[price in thousands]]</code>	965
<code>[[estate agents name]]</code>	Abcd Estate Agents
<code>[[estate agents address]]</code>	77 Elmtree lane, Bournville, Berkshire, BV2 9ZZ
<code>[[estate agents phone]]</code>	(01234) 567891 Fax (01234) 567891
<code>[[estate agents email]]</code>	info@abcd-estate-agents.com

Tagged Document:

Now we can create a tagged document, replacing sections of text with some descriptive labels



inside the `[[and]]` tag markers.

`[[property name]]` is an historic and wonderful `[[property type]]`. The `[[property type]]` has `[[features]]`.

£`[[price in thousands]]`,000

For enquiries please contact

`[[estate agents name]]`

`[[estate agents address]]`

`[[estate agents phone]]` Email: `[[estate agents email]]`

Above is an example of a *tagged document* (some people might call it a “template”). You can call your tags whatever you like, we recommend using descriptive labels.

To kick off the tutorial, please create a new document in a word processor (Word or LibreOffice, or a plain text editor if you prefer). Copy the above Tagged Document text into your document and save it.

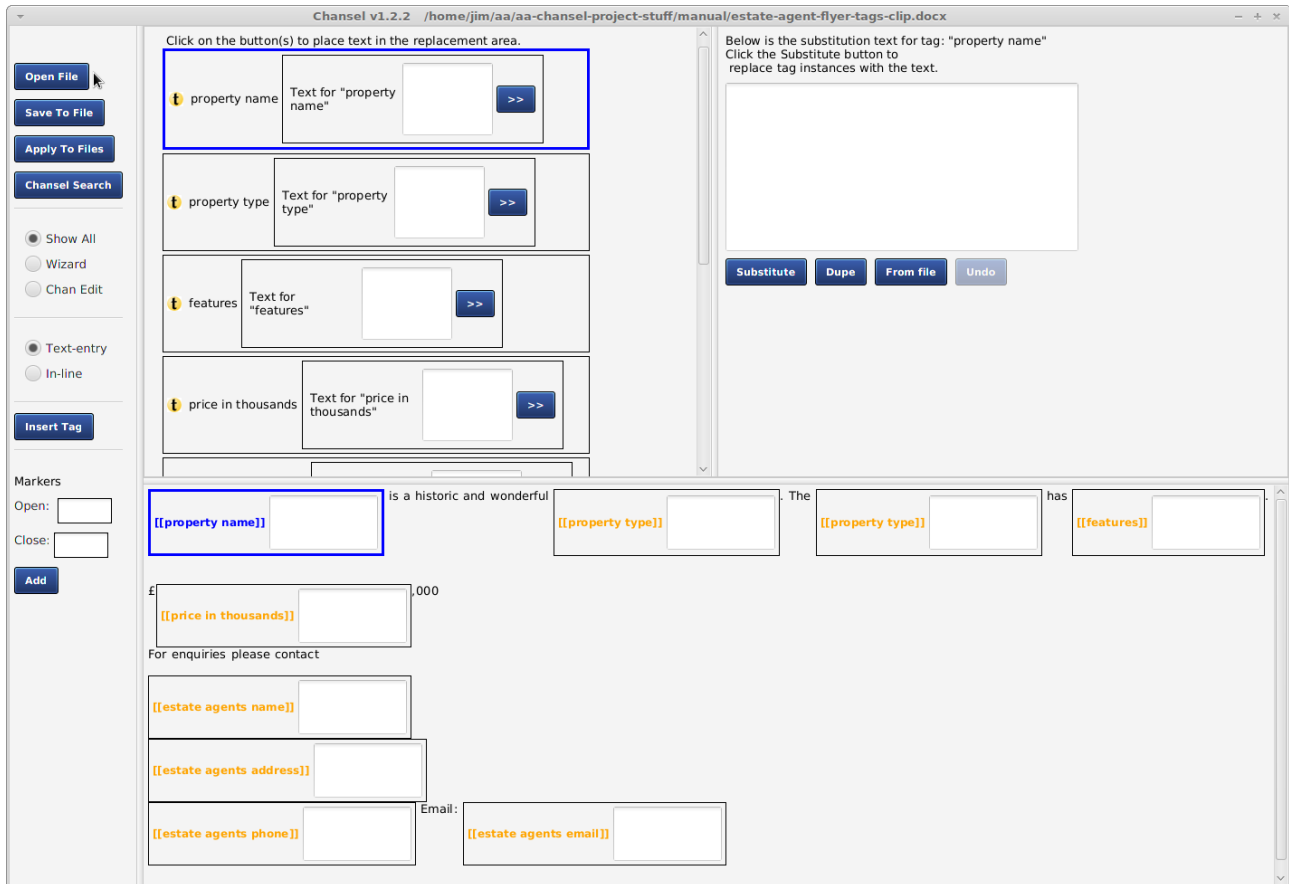
2.1.4 What is a Tag?

A Tag is a descriptive labels of your choosing inside `[[and]]` “markers”. Tags are used to replace or insert text in a document. For example, “Hello `[[name]]`” can become, “Hello Jo Smith”.

Tags can be re-used within a document and, powerfully, they can also re-used across different documents. Chansel is used to replace tags with new text in time and effort saving ways. As for markers (such as “`[[`” and “`]]`”, they can be changed, as described later.

2.1.5 Open Your document in Chansel

In Chansel, click on the “Open File” button and open your Tagged document. You should see something like this:



Apart from the controls on the left, Chansel has three panels.

1. **Document Pane, bottom half:** document text with Tags shown in boxes.
2. **Channels Pane, top left:** Tags in boxes (“Channels” will be shown later).
3. **Substitution Pane, top right:** replace tag with new text.

To see what they do, follow this easy, step-by-step guide.

2.2 Using Chansel Manually With Your Documents

Before moving on to how to *Automate Your documents*, first it is important (and fun) to know how to use Chansel to work with documents manually. Even using Chansel manually can make your life easier.

2.2.1 How to Manually Replace a Tag With Text

This tutorial starts off with basic, yet useful, manual text substitutions.

In Chansel, in the Document Pane (bottom), click on the “Property Type” Tag box. Notice how the selected Tag is now coloured blue in both the Document Pane (bottom) and in the Channels Pane (Top left). In the Channel Pane, the Tags are marked by the small yellow “t” icons.

Next we want to replace our “Property Type” Tag with this text: “cottage”. You can use “Channels” to predefine text, but for now, let's just type some Tag-replacement text in manually. There are three ways you can do this, Via the Document Pane, via the Substitution Pane, and via the Channels Pane.



Type the text directly into the “Property Type” Tag in the Document Pane (bottom). Try it. Notice how both “Property Type” Tag boxes are populated with the word “cottage” as shown below.

The screenshot shows the Chansel v1.2.2 interface. The top pane is the Substitution Pane, which contains a text input field with the word "cottage" and buttons for "Substitute", "Dupe", "From file", and "Undo". The middle pane is the Document Pane, which contains a form with several tags: "[[property name]]", "[[property type]]", "[[features]]", "[[price in thousands]]", "[[estate agents name]]", "[[estate agents address]]", "[[estate agents phone]]", and "[[estate agents email]]". The bottom pane is the Channels Pane, which contains a list of tags: "property name", "property type", "features", and "price in thousands". The "property type" tag is highlighted with a blue border. The "property type" tag in the Document Pane is also highlighted with a blue border and contains the word "cottage". The "property type" tag in the Channels Pane is also highlighted with a blue border and contains the word "cottage".

Notice how Chansel has also copied the text, “cottage” into the Substitution Pane (top right).

Now delete the word cottage in the Document Pane and notice how the word is also removed from the Substitution Pane.

Now type “cottage” into the Substitution Pane. This time click the “Substitute” button to copy the word down to the Document Pane “Property Type” Tag boxes.

Now delete the word “cottage” in the Substitution Pane and click the “Substitute” button. Notice how the word is also removed from the Document Pane.

Finally, type “cottage” into the Channels Pane (top left). You should see the below.



Chansel: Automate Your Documents

Chansel v1.2.2 /home/jim/chansel/tutorial/estate-agent-flyer-tags-clip.docx

Open File
Save To File
Apply To Files
Chansel Search

Show All
Wizard
Chan Edit

Text-entry
In-line

Insert Tag

Markers
Open:
Close:
Add

property name Text for "property name" >>

property type Text for "property type" cottage >>

features Text for "features" >>

price in thousands Text for "price in thousands" >>

Text for "estate agents name" >>

Below is the substitution text for tag: "property type"
Click the Substitute button to replace tag instances with the text.

Substitute Dupe From file Undo

[[property name]] is a historic and wonderful [[property type]]. The [[property type]] has [[features]].

£ [[price in thousands]] ,000

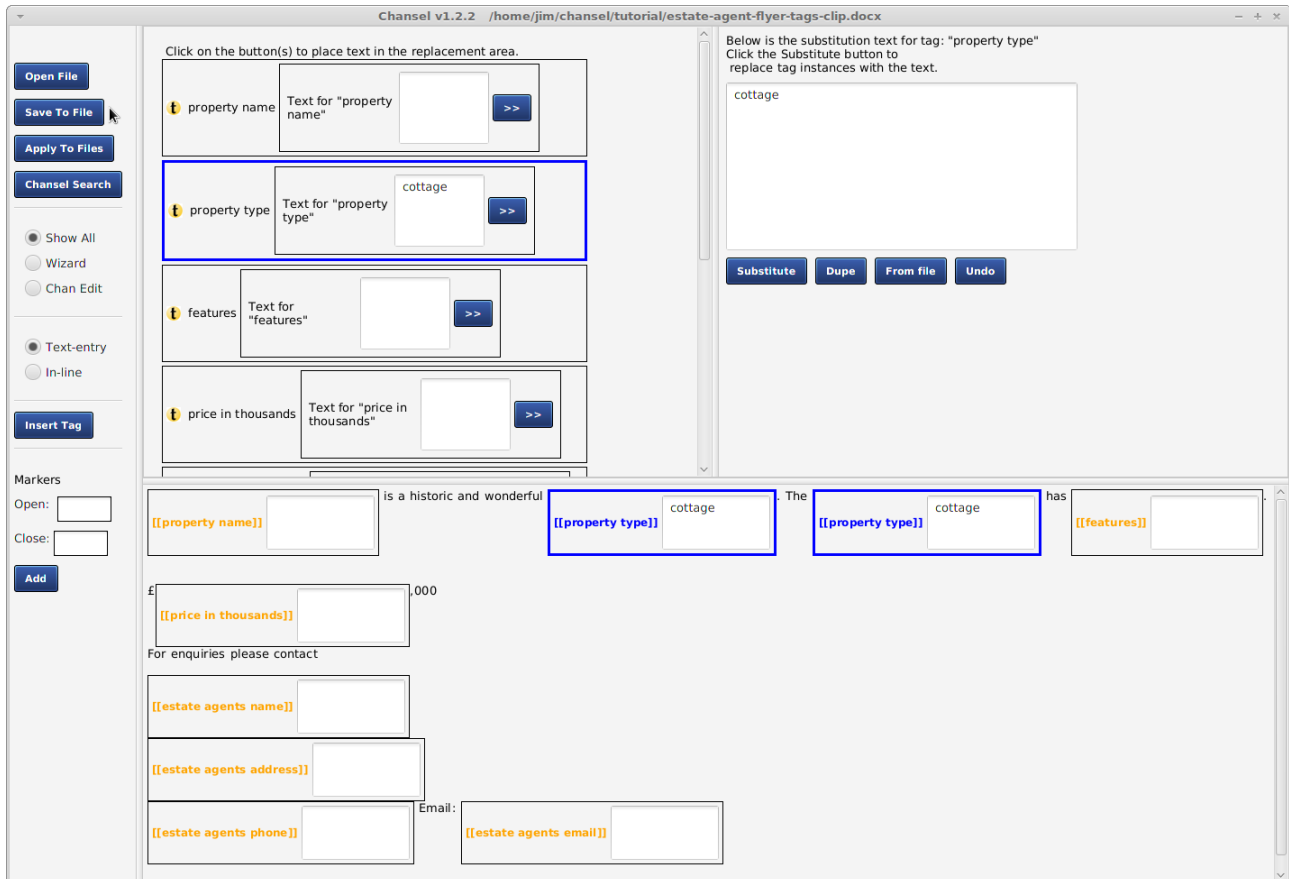
For enquiries please contact

[[estate agents name]]

[[estate agents address]]

[[estate agents phone]] Email: [[estate agents email]]

This time click the “>>” button next to the word “cottage” to copy the word to the Substitution Pane (top right). Next click the “Substitute” button to copy the word into the Document Pane (as we did before).



2.2.2 Save the File

Click on the “Save To File” button on the left hand side. Save your file with a **different** name to the tagged file.

The new document text is:

[[property name]] is an historic and wonderful cottage. The cottage has [[features]].

£[[price in thousands]],000

For enquiries please contact

[[estate agents name]]

[[estate agents address]]

[[estate agents phone]] Email: [[estate agents email]]

In the first line of the above text the word “cottage” appears twice: this word has replaced both of the [[property type]] tags. We haven't replaced the other tags... yet.

Saving the file preserves the formatting of the original document. Headings, headers, tables, images and so on are preserved. The the only difference is that tags get substituted.

2.2.3 Manually Replace the other Tags

In a similar way we can quickly replace the other tags using Chansel. After this, we will see how we



can speed this up by getting Chansel to do some of the work for us (i.e. automate the document!)

As shown below we can complete our document using the same steps we did for the [[Property Type]] tag.

The values for the tags can be these:

Tag	Example Replacement Text
[[property name]]	Bellview
[[features]]	a luxury kitchen / dining room with appliances, study, bathroom with a bath and shower cubicle, burglar alarm system, gas central heating and a large gardens
[[price in thousands]]	965
[[estate agents name]]	Abcd Estate Agents
[[estate agents address]]	77 Elmtree lane, Bournville, Berkshire, BV2 9ZZ
[[estate agents phone]]	(01234) 567891 Fax (01234) 567891
[[estate agents email]]	info@abcd-estate-agents.com

Plug in the example replacement text for each tag in Chansel.



The screenshot shows the Chansel v1.2.2 application window. The title bar indicates the file path: /home/jim/chansel/tutorial/estate-agent-flyer-tags-clip.docx. The interface is divided into several sections:

- Left Panel:** Contains buttons for 'Open File', 'Save To File', 'Apply To Files', and 'Chansel Search'. Below these are radio buttons for 'Show All', 'Wizard', and 'Chan Edit'. Further down are radio buttons for 'Text-entry' (selected) and 'In-line'. At the bottom of this panel are 'Markers' with 'Open:' and 'Close:' fields, and an 'Add' button.
- Main Panel (Top):** Displays a list of tags to be placed in the document. Each tag has a label (e.g., 'property name', 'property type', 'features', 'price in thousands') and a text input field. The 'features' tag is highlighted with a blue border. A '>>' button is next to each tag's input field.
- Main Panel (Right):** Shows the substitution text for the selected 'features' tag: 'a luxury kitchen / dining room with appliances, study, b...'. Below this text are buttons for 'Substitute', 'Dupe', 'From file', and 'Undo'.
- Main Panel (Bottom):** Displays the resulting document template. The text is: '[[property name]] Bellview is a historic and wonderful [[property type]] cottage. The [[property type]] cottage has [[features]] a luxury kitchen, £[[price in thousands]] 965,000. For enquiries please contact [[estate agents name]] Abcd Estate Age, [[estate agents address]] 77 elmtree lane, [[estate agents phone]] (01234) 567891 Email: [[estate agents email]] info@abcd-estate'. The tags are enclosed in green boxes, and the 'features' tag is enclosed in a blue box.

Save the file to a file with a new file name. Your new document should resemble this:

Bellview is an historic and wonderful cottage. The cottage has a luxury kitchen / dining room with appliances, study, bathroom with a bath and shower cubicle, burglar alarm system, gas central heating and a large gardens.

£965,000

For enquiries please contact

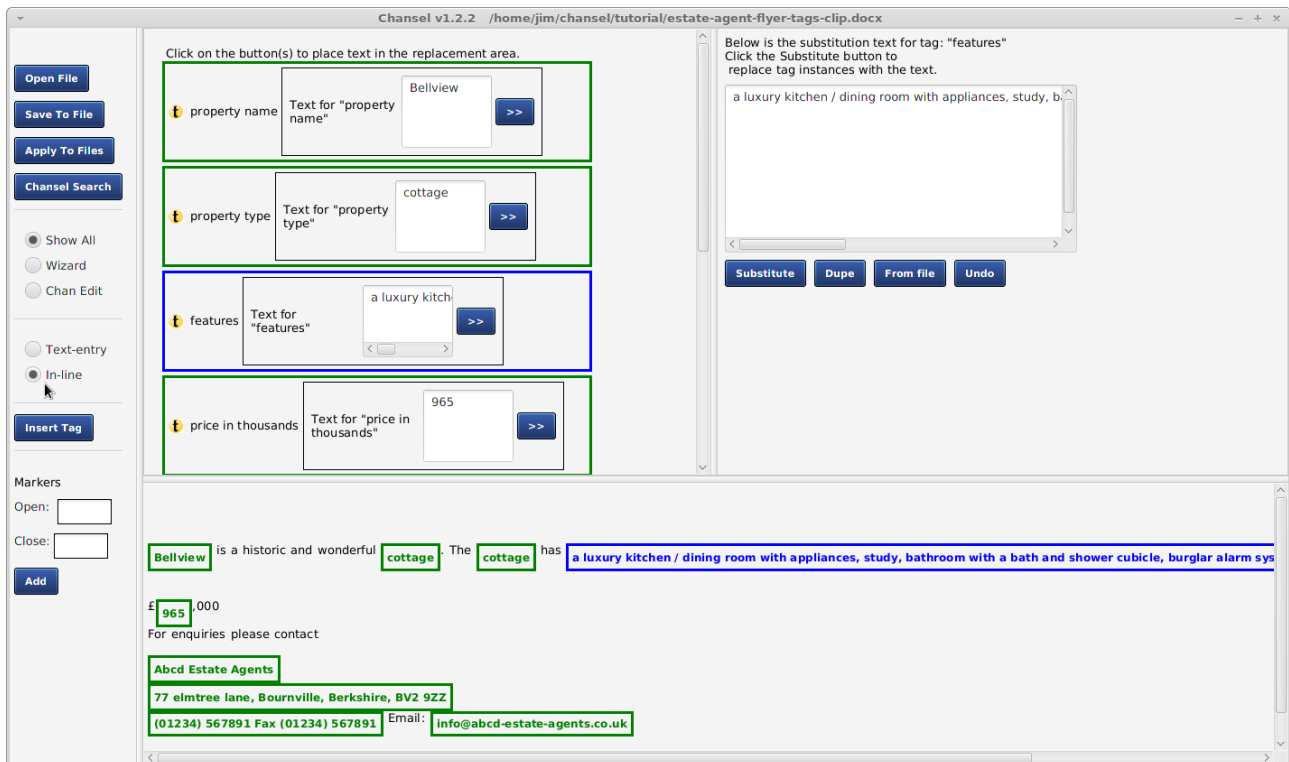
Abcd Estate Agents

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(01234) 567891 Fax (01234) 567891 Email: info@abcd-estate-agents.com

2.2.4 Document Pane In-line Mode

On the left you can click the “In-Line” radio button.



The Document Pane (bottom) now shows tag replacement text in a clearer way. Clicking on the “Text entry” radio button takes you back to being able to enter tag replacement text directly into the Document Pane.

2.3 Using Chansel to Automate Your Documents!

Now that you have used Chansel to work with your documents manually, it is time to “Automate Your Documents”. Automating a document makes creating or editing similar documents fast, accurate and easy.

2.3.1 Channels

Channels are used to automate your documents. Channels remember your useful text and save you the error-prone hassle of typing and copying-and-pasting. Because Channels you create are stored in Chansel's database they are available when you close Chansel and open it again in the future. The most frequently used channels are Text Channels and Question Channels.

2.3.2 Text Channels

A Text Channel contains predefined text (specified by you) that you want to use as replacement text for a Tag and makes that text available at the click of a button.

Before we start, delete the text for the [[property type]], [[features]] and [[estate agents name]] tags as shown.



Chansel: Automate Your Documents

Chansel v1.2.2 /home/jim/chansel/tutorial/estate-agent-flyer-tags-clip.docx

Click on the button(s) to place text in the replacement area.

property name Text for "property name" Bellview >>

property type Text for "property type" >>

features Text for "features" >>

price in thousands Text for "price in thousands" 965 >>

estate agents name Text for "estate agents name" >>

Below is the substitution text for tag: "estate agents name"
Click the Substitute button to replace tag instances with the text.

Substitute Dupe From file Undo

Markers
Open:
Close:
Add

[[property name]] Bellview is a historic and wonderful [[property type]] . The [[property type]] has [[features]] .

£ [[price in thousands]] 965 .000

For enquiries please contact

[[estate agents name]]

[[estate agents address]] 77 elmtree lane,

(01224) 563801 Email: info@shred-estate

To start automating your document, create a Text Channel. On the left hand side panel, click on the “Chan Edit” radio button. This puts Chansel into “Channel Edit” mode.



Chansel: Automate Your Documents

Chansel v1.2.2 /home/jim/chansel/tutorial/estate-agent-flyer-tags-clip.docx

Click on the buttons to edit, add or remove channels.

property name +

property type +

features +

price in thousands +

estate agents name +

estate agents address +

estate agents phone +

estate agents email +

Open File

Save To File

Apply To Files

Chansel Search

Show All

Wizard

Chan Edit

Text-entry

In-line

Insert Tag

Markers

Open:

Close:

Add

[[property name]] Bellview is a historic and wonderful [[property type]] . The [[property type]] has [[features]] .

£ [[price in thousands]] 965 ,000

For enquiries please contact

[[estate agents name]]

[[estate agents address]] 77 elmtree lane,

[[estate agents phone]] (01224) 563801 Email: [[estate agents email]] info@shred-estate.co.uk

In the Channel Pane (upper left) the Tags are still there but now they each have a “+” button. Create your first Text Channel: click the “+” button associated with the “client name” Tag.



Channel to Add

Channel Title: Estate Agents Name

☒ Text Channel
☐ File Channel
☐ Remote Channel
☐ Web Channel
☐ Image Channel

Channel Text: Abcd Estate Agents

Description: The name of the estate agent.

Save Cancel

Enter text for the following as shown above.

- **Channel Title** is the Channel descriptive label.
- **Channel Text** is the all-important replacement text.
- **Description** is an optional description saying what this channel is for.

Click the “Save” button.



Chansel: Automate Your Documents

Chansel v1.2.2 /home/jim/chansel/tutorial/estate-agent-flyer-tags-clip.docx

Click on the buttons to edit, add or remove channels.

property name +

property type +

features +

price in thousands +

estate agents name

Estate Agents Name e + x

estate agents address +

estate agents phone +

Markers

Open:

Close:

Add

[[property name]] Belview

[[property type]]

[[property type]]

[[features]]

£ [[price in thousands]] 965 ,000

For enquiries please contact

[[estate agents name]]

[[estate agents address]] 77 elmtree lane,

[[estate agents phone]] (01234) 567891 Email: [[estate agents email]] info@abcd-estate

The Text Channel entitled “Estate Agents Name” has been created in the Channel Pane. Click the “Show All” radio button (on the left) to return to Chansel in “Show All” mode.



Chansel: Automate Your Documents

Chansel v1.2.2 /home/jim/chansel/tutorial/estate-agent-flyer-tags-clip.docx

Click on the button(s) to place text in the replacement area.

property name Text for "property name" Bellview >>

property type Text for "property type" >>

features Text for "features" >>

price in thousands Text for "price in thousands" 965 >>

estate agents name Estate Agents Name Abcd Estate A >>

77 elmtree lai

Below is the substitution text for tag: "estate agents name"
Click the Substitute button to replace tag instances with the text.

Substitute Dupe From file Undo

[[property name]] Bellview

[[property type]]

[[property type]]

[[features]]

£ [[price in thousands]] 965 ,000

For enquiries please contact

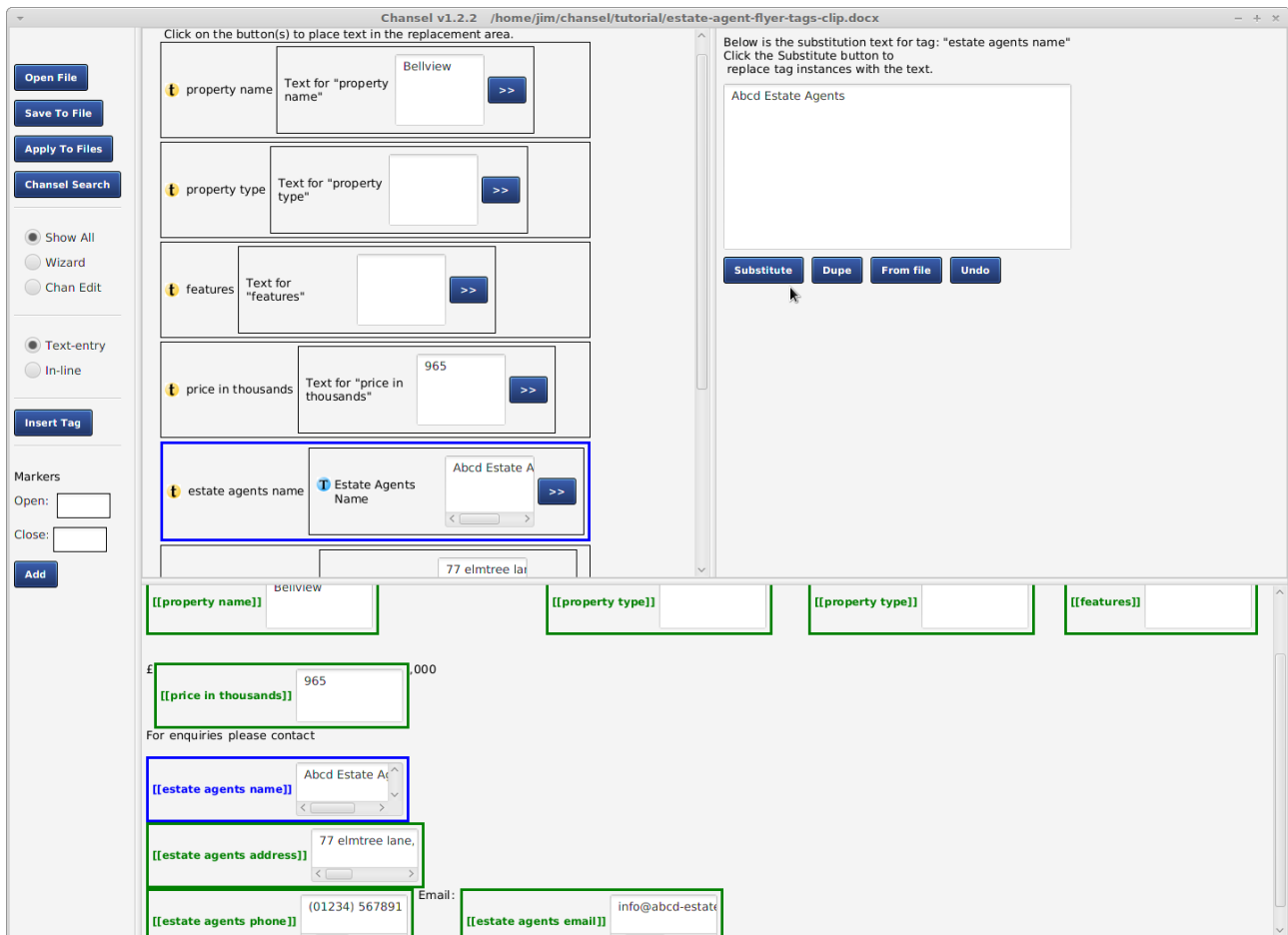
[[estate agents name]]

[[estate agents address]] 77 elmtree lane,

[[estate agents phone]] (01234) 567891 Email: [[estate agents email]] info@abcd-estate

With Chansel back in “Show All” mode, the new Text Channel has a blue “T” icon. It has pre-populated the text area next to it with the channel's text, which you typed in when creating the channel.

Click on the “>>” button of the Channel to copy the Channel text into the Substitution Pane, and click on the “Substitute” button to copy the text into the Document Pane.



In the Document Pane, bottom, is the new replacement text, “abcd-estate-agents.com”, in the `[[estate agents name]]` tag (blue box).

Why create the Channel? Chansel saves Channels to its database so you can re-use them in the future. Whenever you open the same - or a different document - that contains the same Tag, e.g. `[[estate agents name]]`, then Chansel will provide this Channel with its stored replacement text. This is true even if Chansel is closed and re-opened later. You won't need to retype in that replacement text, e.g. “abcd-estate-agents.com” for documents containing the Tag that the channel is associated with, e.g. `[[estate agents name]]`. Channels are editable, so you can update them or even delete them at any time.

Notice how Chansel lets you automate your documents without having to do any programming or scripting!

2.3.3 Question Channels

Question Channels provide you with a *choice* of replacement text from two or more options. They are called “Question Channels” because, loosely speaking, they ask a question, which replacement text would you like?

You can now “Automate” another part of your document by creating a re-usable list of *features* that properties have. They include a “luxury kitchen” and “gas central heating”.



To create a Question Channel, in Chansel, on the left hand side panel, click on the “Chan Edit” radio button to put Chansel into *Channel Edit* mode. Click on the “+” button that is associated with the “features” tag. Create a Text Channel.

Enter text for the following as shown above. You can also add an optional Channel description if you wish.

Click the “Save” button.



Chansel v1.2.2 /home/jim/chansel/tutorial/estate-agent-flyer-tags-clip.docx

Click on the buttons to edit, add or remove channels.

property name +

property type +

features **Luxury Kitchen** e + x

price in thousands +

estate agents name **Estate Agents Name** e + x

estate agents address +

Open File
Save To File
Apply To Files
Chansel Search

Show All
Wizard
Chan Edit

Text-entry
In-line

Insert Tag

Markers
Open:
Close:
Add

Bellview is a historic and wonderful [[property type]]. The [[property type]] has [[features]].

£ 965,000

For enquiries please contact

Abcd Estate Agents

77 elmtree lane, Bournville, Berkshire, BV2 9ZZ

(01234) 567891 Fax (01234) 567891 Email: info@abcd-estate-agents.com

As you can see, we have created our Text Channel called “Luxury Kitchen”.

Incidentally, on the left hand side, the “In-line” radio button has been clicked to make the Document Pane (bottom) easier to read. The green tags are tags that have already have replacement text for them. The blue tag is the currently selected tag.

To create the Question Channel, click the plus button that is next to the new “Luxury Kitchen” Text Channel.



Channel to Add

Channel Title:

Dining Room

☒ Text Channel

☐ File Channel

☐ Remote Channel

☐ Web Channel

☐ Image Channel

Channel Text:

dining room

Description:

Optional channel description.

Save

Cancel

We add a new Text Channel for another feature, the dining room. Click Save.



Chansel v1.2.2 /home/jim/chansel/tutorial/estate-agent-flyer-tags-clip.docx

Click on the buttons to edit, add or remove channels.

property name +

property type +

features

Question: Luxury Kitchen e

Luxury Kitchen e + x

Dining Room e + x

price in thousands +

Estate Agents e

Markers

Open:

Close:

Add

[[property type]]

[[property type]]

[[features]]

£ 965 ,000

For enquiries please contact

Abcd Estate Agents

77 elmtree lane, Bournville, Berkshire, BV2 9ZZ

(01234) 567891 Fax (01234) 567891 Email: info@abcd-estate-agents.com

By adding our second Text Channel we have also, as a side effect, created a Question Channel! The Question Channel has a green “Q” icon. By default, the Question Channel Title re-uses the title of the first Text Channel we created. Let’s edit it. Click on the “e” button that is directly next to the Question Channel.



▼ Edit question channel: Question: Luxury Kitchen — + ×

Channel Title:

Description:

This Question Channel allows you to select features for the property.

Edit the Question Channel as shown above and click Save.



Chansel v1.2.2 /home/jim/chansel/tutorial/estate-agent-flyer-tags-clip.docx

Click on the buttons to edit, add or remove channels.

property name +

property type +

features Which feature would you like? e

Luxury Kitchen e + x

Dining Room e + x

price in thousands +

Estate Agents e

Belview is a historic and wonderful [[property type]]. The [[property type]] has [[features]].

£ 965,000

For enquiries please contact

Abcd Estate Agents

77 elmtree lane, Bournville, Berkshire, BV2 9ZZ

(01234) 567891 Fax (01234) 567891 Email: info@abcd-estate-agents.com

The Question Channel now has a new title, as shown above.

Next add Text Channels for some more features. This is done by clicking the “+” button **under** the Dining Room Text Channel. (It is the “+” button next to the mouse pointer in the screen-shot above).

New features suggestions (or you can invent your own and the order does not matter much):

- appliances
- study
- bathroom with a bath and shower cubicle



Chansel v1.2.2 /home/jim/chansel/tutorial/estate-agent-flyer-tags-clip.docx

property name

property type

☐ Show All
☐ Wizard
☒ Chan Edit

☐ Text-entry
☒ In-line

Insert Tag

Markers
Open:
Close:
Add

features Which feature would you like?

Luxury Kitchen

Dining Room

Appliances

Study

Bellview is a historic and wonderful . The has .

£ ,000

For enquiries please contact

Abcd Estate Agents

77 elmtree lane, Bournville, Berkshire, BV2 9ZZ

(01234) 567891 Fax (01234) 567891 Email:

We have added Text Channels for some features. (Not all of the new Text Channels are visible in the screen-shot but you can slide the vertical scroll bar to see them all in Chansel). Click on the “Show All” radio button on the left hand side.



Chansel v1.2.2 /home/jim/chansel/tutorial/estate-agent-flyer-tags-clip.docx

Open File

Save To File

Apply To Files

Chansel Search

Show All

Wizard

Chan Edit

Text-entry

In-line

Insert Tag

Markers

Open:

Close:

Add

property type

Text for "property type"

>>

features

Which feature would you like?

Luxury Kitchen

luxury kitchen

>>

Dining Room

dining room

>>

Appliances

appliances

>>

Study

study

>>

Bathroom with a Bath and Shower Cubicle

bathroom with

>>

Text for "price in"

965

Below is the substitution text for tag: "features"

Click the Substitute button to replace tag instances with the text.

Substitute Dupe From file Undo

Bellview is a historic and wonderful . The has .

£ 000

For enquiries please contact

Abcd Estate Agents

77 elmtree lane, Bournville, Berkshire, BV2 9ZZ

(01234) 567891 Fax (01234) 567891 Email:

You can see our newly created Question Channel and it's child Text Channels. Often you will want the text from just a single child Text Channel. For example, a legal contract might have a Question Channel with several child Text Channels, each with a paragraph or two of legal text. And you would only need one of them. Here, however, we want more than one feature for our property. So click on the ">>" buttons to add the features (text) you want to the Substitution Pane.



Chansel: Automate Your Documents

Chansel v1.2.2 /home/jim/chansel/tutorial/estate-agent-flyer-tags-clip.docx

property type Text for "property type" >>

features Which feature would you like?

- Luxury Kitchen** luxury kitchen >>
- Dining Room** dining room >>
- Appliances** appliances >>
- Study** study >>
- Bathroom with a Bath and Shower Cubicle** bathroom with >>

Text for "price in" 965

Below is the substitution text for tag: "features"
Click the Substitute button to replace tag instances with the text.

luxury kitchendining roomappliancesstudybathroom with

Substitute Dupe From file Undo

Markers
Open:
Close:
Add

Bellview is a historic and wonderful [[property type]]. The [[property type]] has [[features]].

£ 965,000
For enquiries please contact

Abcd Estate Agents
77 elmtree lane, Bournville, Berkshire, BV2 9ZZ
(01234) 567891 Fax (01234) 567891 Email: info@abcd-estate-agents.com

You can see in the Substitution Pane, top right, that the Text Area has been populated by the text we have transferred from the Text Channels. Next you can edit this text and click the Substitute button.



Chansel: Automate Your Documents

Chansel v1.2.2 /home/jim/chansel/tutorial/estate-agent-flyer-tags-clip.docx

Open File
Save To File
Apply To Files
Chansel Search

☒ Show All
☐ Wizard
☐ Chan Edit

☐ Text-entry
☒ In-line

Insert Tag

Markers
Open:
Close:
Add

property type Text for "property type" **>>**

features Which feature would you like?

Luxury Kitchen luxury kitchen **>>**

Dining Room dining room **>>**

Appliances appliances **>>**

Study study **>>**

Bathroom with a Bath and Shower Cubicle bathroom with **>>**

Text for "price in" 965 **>>**

Below is the substitution text for tag: "features"
Click the Substitute button to replace tag instances with the text.

a luxury kitchen / dining room with appliances, study, bath

Substitute **Dupe** **From file** **Undo**

Bellview is a historic and wonderful **[[property type]]**. The **[[property type]]** has a luxury kitchen / dining room with appliances, study, bathroom with a bath and shower cubicle.

£ **965** ,000

For enquiries please contact

Abcd Estate Agents

77 elmtree lane, Bournville, Berkshire, BV2 9ZZ

(01234) 567891 Fax (01234) 567891 Email: info@abcd-estate-agents.com

After some minor editing in the substitution pane and clicking on the Substitute button, you now have well formed text describing features in the document pane.

Next click on "Chan Edit" radio button (left hand side) again.



Chansel v1.2.2 /home/jim/chansel/tutorial/estate-agent-flyer-tags-clip.docx

property name

property type

features

Which feature would you like?

Luxury Kitchen

Dining Room

Appliances

Study

Open File

Save To File

Apply To Files

Chansel Search

Show All

Wizard

Chan Edit

Text-entry

In-line

Insert Tag

Markers

Open:

Close:

Add

Bellview is a historic and wonderful . The has .

£ 965,000

For enquiries please contact

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77 elmtree lane, Bournville, Berkshire, BV2 9ZZ

(01234) 567891 Fax (01234) 567891 Email: info@abcd-estate-agents.com

If desired, you can create *nested* Question Channels by clicking on the “+” buttons in the child Text Channels. For example, by clicking on the “+” button in the “Luxury Kitchen” Question Channel, you can create a new Question Channel, that is a child of the existing Question Channel. This could have child Text Channels that have different types of Kitchens. For example, “Luxury Kitchen”, “Spacious Kitchen”, and so on. By using hierarchical Question Channels you can group similar child Channels together.

A note on buttons. As you have seen, the “e” buttons are used to edit channels. As you might have guessed, the “x” buttons are used to delete Channels. In order to delete a Question Channel you first need to delete its child channels.

If using Chansel in Show All mode gets unwieldy you can use Chansel in Wizard mode, as explained below.



2.4 Using Chansel In Wizard Mode

You have used Chansel in “Show All” mode and “Chan Edit” mode. Chansel can also be used in “Wizard” mode. “Show All” mode displays all the Tags and their Channels together, which means that the Channels Pane (upper left) can sometimes get rather crowded. Wizard mode is a simpler, step-by-step interface.

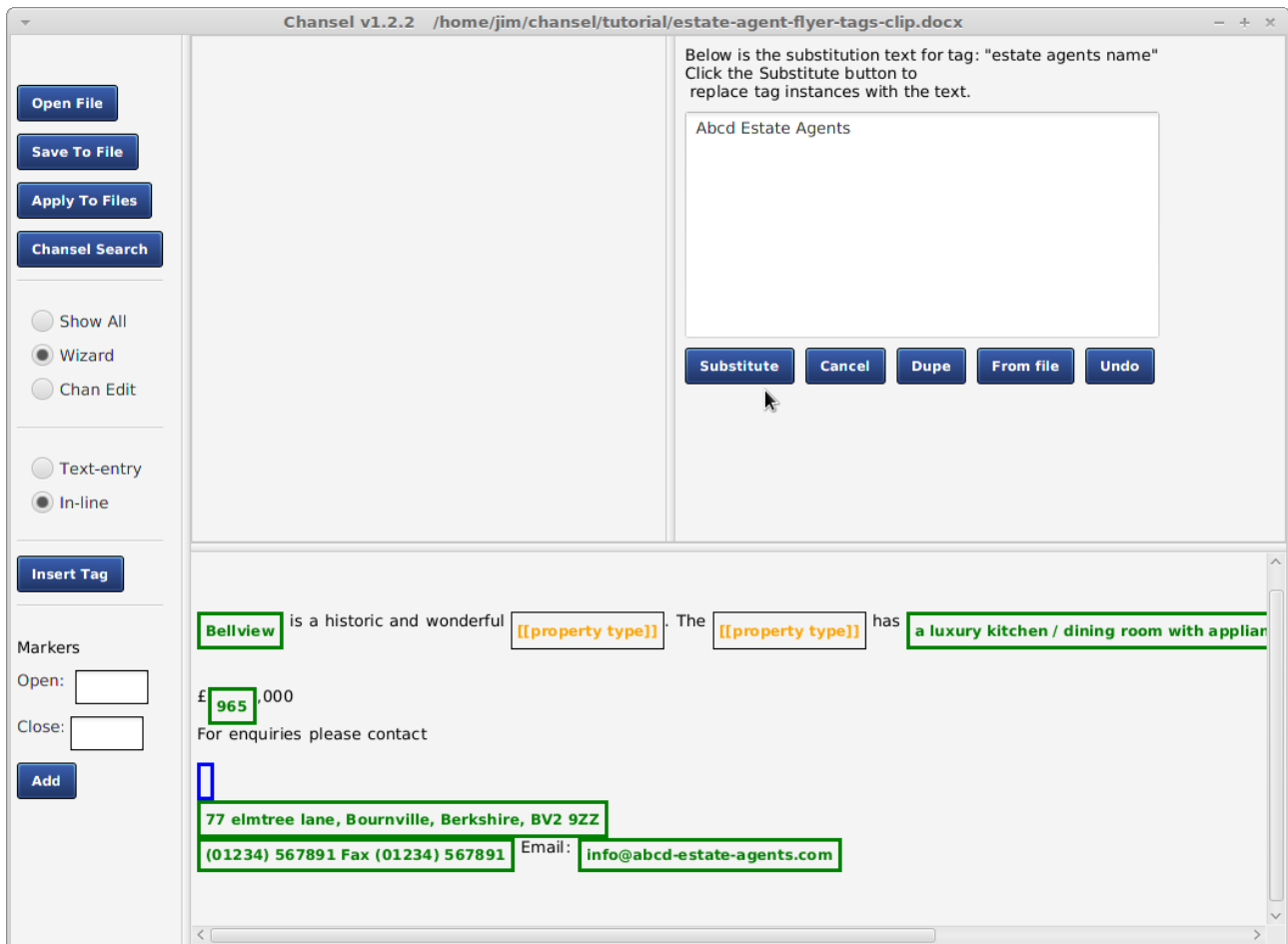
First we will clear the replacement text for the `[[estate agent name]]` tag. Select that tag in the Channels Pane and *delete* the replacement text (“Abcd Estate Agents”) in the Substitution Pane (upper right). Then click the substitute button. This will remove the replacement text for the `[[estate agent name]]` tag in the Document Pane.

Click on the “Wizard” radio button (on the left).

Click on the “>>” button next to the “estate agents name” tag.

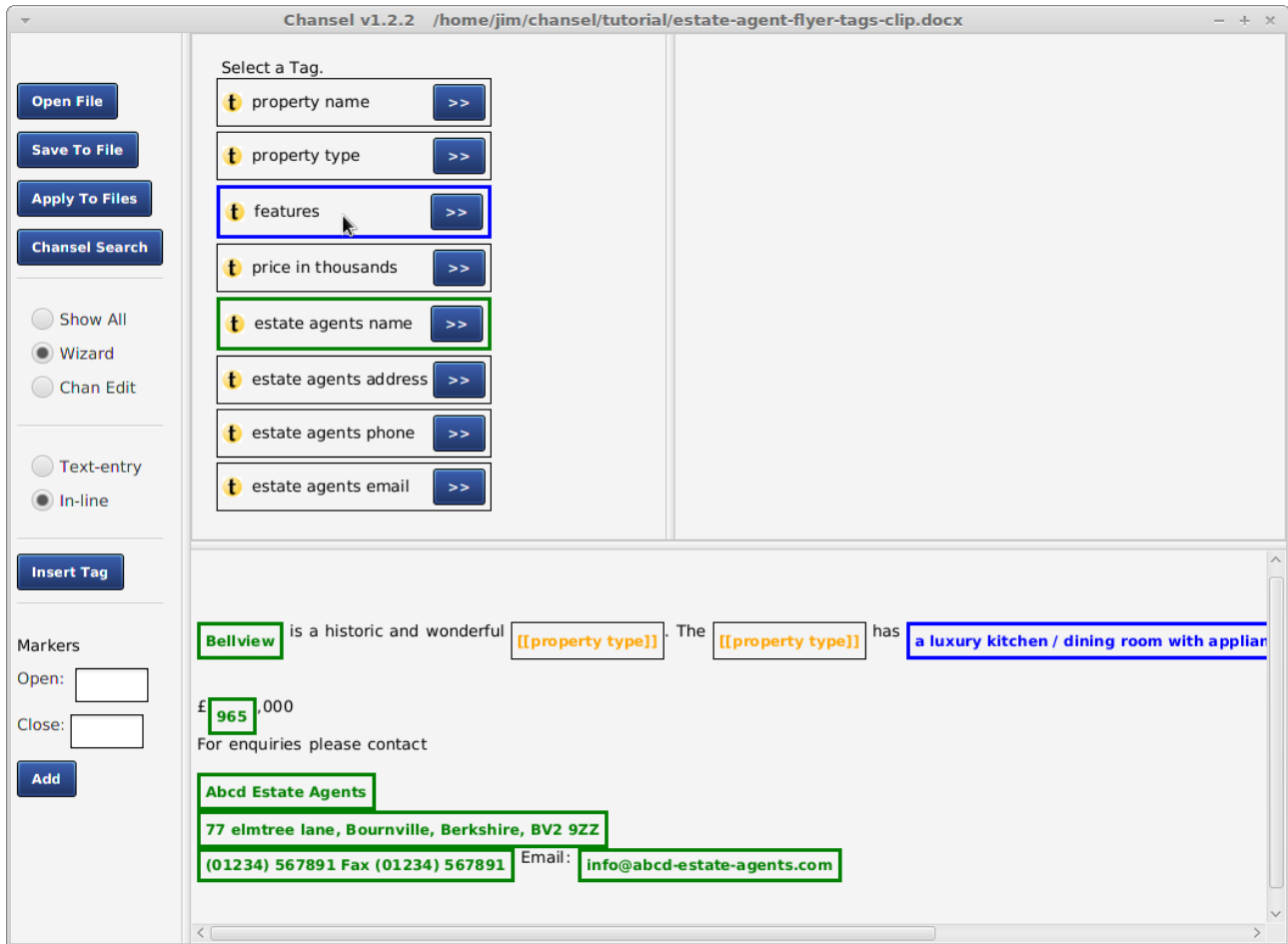


Chansel: Automate Your Documents



The Channel text has been placed into the Substitution Pane (upper right).

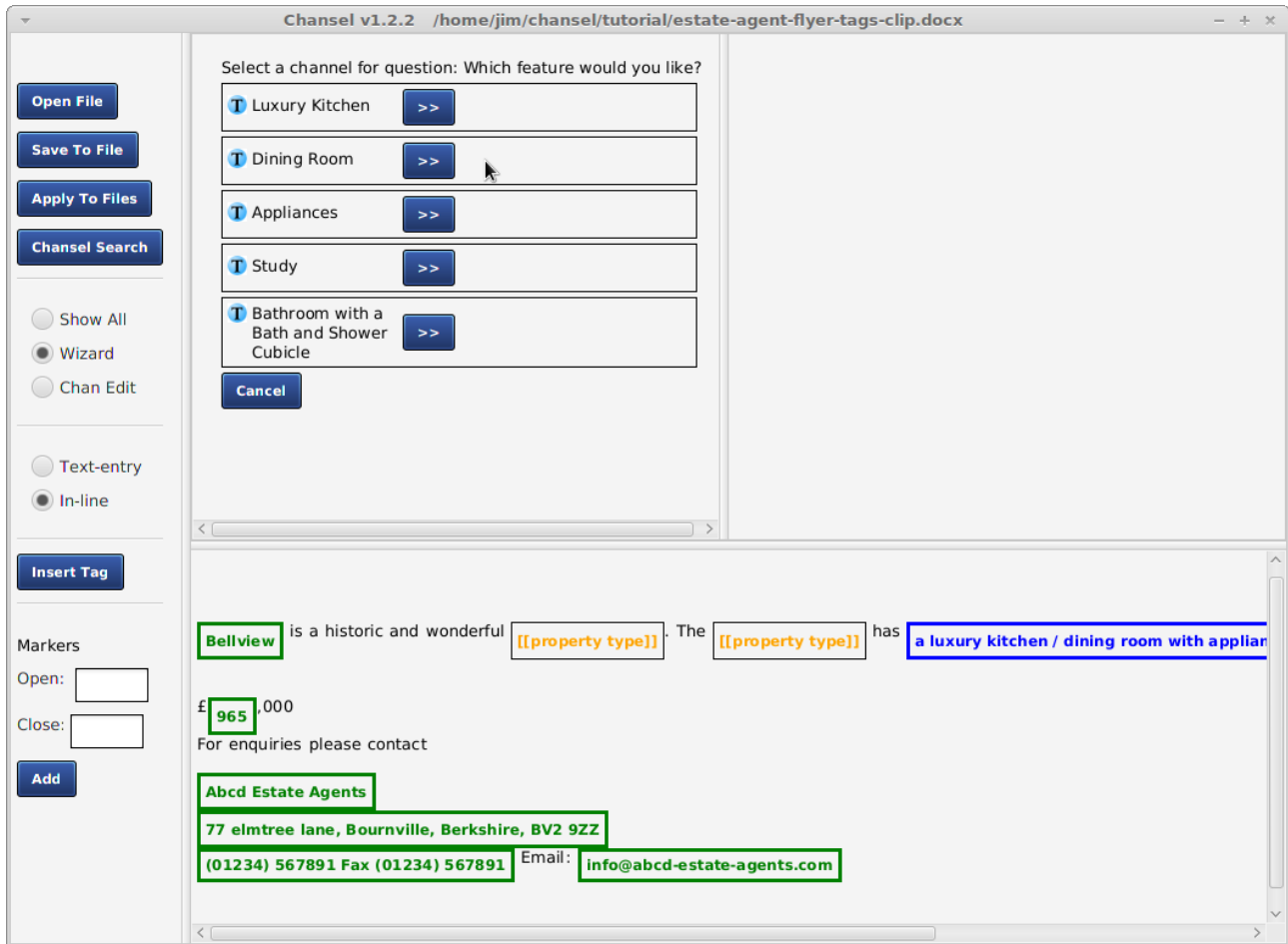
Click the “Substitute” button.



The Chansel text, “Abcd Estate Agents” has been placed into Document Pane.

Click on the “features” tag in the Channel Pane. (Notice, above, that the “estate agents name” tag in the Channel Pane is now coloured green, showing that we have already processed this tag in Wizard Mode).

Click on the “>>” button in the features tag.



For this `[[features]]` tag, "Wizard" Mode shows us a list of Text Channels, as shown above. These Text Channels are the child channels of the Question Channel we created earlier for that tag. As before, you can click on a ">>" button to obtain the replacement text for the tag that you want.

If you have a deeper "tree" of Channels (as mentioned earlier, you can create nested Question Channels) then Wizard mode will walk you through that tree step by step so you can focus on only one thing at a time.

Another advantage of Wizard mode is that it makes it easier to write step-by-step instructions for other user people to build documents for you.

In conclusion, use "Show All" Mode for when you like having everything on the screen at once. Or use "Wizard" Mode when you prefer to concentrate on small parts of the document at a time.

2.5 Step By Step Guide Conclusion

The most important parts of the tutorial and step by step guide are completed and now you know all you need to know to Automate Your Documents! Carry on reading if you would like to learn about additional handy features that Chansel offers.

3 Chansel Search

On the left there is a button labelled "Chansel Search". Clicking on this shows you Chansel's



powerful document text browsing, file storage and document search engine features. Chansel Search is essentially a whole new application in its own right, Chansel is two applications in one. Therefore Chansel Search has its very own Manual and Tutorial, which you can download from our website <http://chanseldoc.com>.

4 Additional Features That You Might Find Useful

4.1 Miscellaneous Features

Congratulations. You have learned how to Automate Your Documents using Chansel. Chansel has some additional tools, some of which you might find useful, especially if you consider yourself a “Power User”. Feel free to skip past the sections describing things you don't think you will need.

The most advanced and obscure stuff is left until last.

4.1.1 In-line Document Pane View Mode

The “In-line” radio button in the left panel shows a kind of *preview* of the text as it will appear in the final document (the Tag names are no longer shown in the Document Pane if they have been substituted).

Blue text represents the currently selected tag. Green text shows a tag that has already been substituted in the Document Pane. Red indicates there is unsubstituted text in the Substitution Pane text area. To substitute the text into the Document Pane, click on the tag and then click the Substitution Pane “substitute” button.

Clicking on the “Text Entry” radio button in the left panel returns the Document Pane into a mode where the tag names are always displayed and you can type directly into the tags in the Document Pane.

4.1.2 Substitution Pane Buttons

- The “From File” button can be used to import text into the Substitution Pane text area from a file.
- The “Dupe” button duplicates the text in the Substitution Pane Text Area.
- The “Undo” button can undo a change made via the Substitution Pane.

4.1.3 Supported File Types

Chansel as used for document automaton / editing supports the following file types:

- Plain text (also known as ASCII) files. These usually have file extensions such as .txt, .text, etc.
- Microsoft Word “docx” format documents
- Open Office and LibreOffice “.odt” format documents.
- Plain text technical / source code files such as XML files, web page files etc. These files have extensions such as .xml, .html, .css, .js, .java etc.



Some notes on File Formats:

- Open Office Note: Chansel may display some document “metadata” for “.odt” files at the bottom of the Document Pane, such as the author’s name. This metadata can safely be ignored.
- Chansel can work with older Microsoft Office formats, with extension “.doc”, but in a limited way. Chansel is designed for the newer .docx format files.

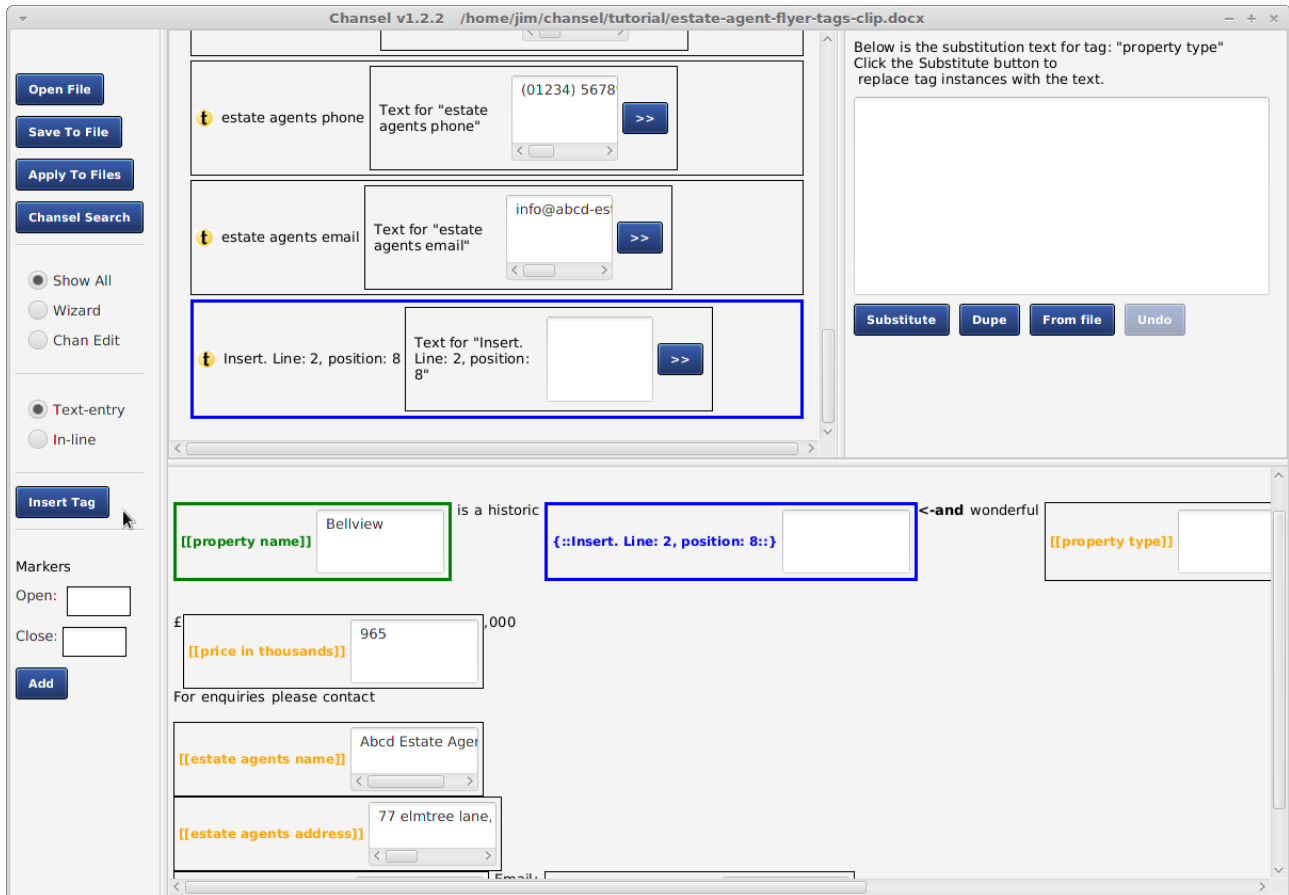
4.1.4 Inserting Text using an “Insert Tag”

Chansel allows you to insert text into your document without using an explicit Tag in the document. Click on a Word in the Document Pane.

The screenshot shows the Chansel v1.2.2 application window. The title bar reads "Chansel v1.2.2 /home/jim/chansel/tutorial/estate-agent-flyer-tags-clip.docx". On the left is a sidebar with buttons: "Open File", "Save To File", "Apply To Files", "Chansel Search", "Show All", "Wizard", "Chan Edit", "Text-entry" (selected), "In-line", "Insert Tag", "Markers", "Open:", "Close:", and "Add". The main area is divided into three panes. The top pane, titled "Click on the button(s) to place text in the replacement area.", contains three rows of controls. The first row has a tag icon, the text "property name", a text box with "Bellview", and a ">>" button. The second row has a tag icon, the text "property type", an empty text box, and a ">>" button. The third row has a tag icon, the text "Luxury Kitchen", and an empty text box. The right pane, titled "Below is the substitution text for tag: 'property type'", contains a large empty text box and buttons for "Substitute", "Dupe", "From file", and "Undo". The bottom pane shows a document preview with several tags inserted: "[[property name]] Bellview", "[[price in thousands]] 965", "[[estate agents name]] Abcd Estate Ager", and "[[estate agents address]] 77 elmtree lane,". The word "and" in the text "is a historic <-and wonderful" is bolded and has a left-pointing arrow marker next to it. The tags are highlighted with green and blue boxes.

Above you can see that we have clicked the word, “and” in the Document Pane. The word or symbol you click on becomes bold, with an arrow marker, “<-”, next to it.

Click on the “Insert Tag” button on the left hand side.



A new Insert Tag has the title: “Insert, Line 2, position: 8” has been created. “Insert Tags” are not preserved after you close Chansel. Nor can you create Channels for them. They are simply a convenient way to insert new text into your document. The easiest way to do this is to type directly into the Insert Tag in Document Pane.

You can also replace non-tagged text in the document pane, as will be explained later.

4.2 More Types of Channels

Text and Question Channels have been explained already. There are other Channel types too, with specialist capabilities. These are presented below.

4.2.1 File Channels

File Channels are like Text Channels except instead of you defining the text directly, you specify a file that contains the text.



Channel to Add

Channel Title:

☐ Text Channel
☒ File Channel
☐ Remote Channel
☐ Web Channel
☐ Image Channel

Description:

When creating a File Channel, you to specify a path (location) to a file (either directly or by clicking on the file via a file browser). Whenever you open a tagged document in Chansel, if there is a tag that has a File Channel associated with it, then Chansel will extract the text from that file. After it has extracted the text, the File Channel works the same way as a Text Channel.

4.2.2 Remote Channels

Remote file Channels are rarely used. They are similar to File Channels except that they contain a path to a file on a remote file directory. File Transfer Protocol (FTP) details that are required to access that remote file. For performance reasons, Chansel will not automatically import the text from the remote file, but this can be done at a click of a button.

Note: It may take some time for Chansel to time-out if Chansel is unable to connect to the remote server.

Remote Channels are useful to allow the sharing of Tag substitution text. Another way of sharing substitution text amongst users is to share the Chansel database, which is a topic mentioned in the Advanced section.

4.2.3 Web Channels

Web Channels are rarely used. They support importing replacement text from a special type of



“Web Service” called a REST (or RESTful) web service. A Web Channel works similarly to a Text Channel except that, in the *Channel To Add* dialog in *Edit Mode* you enter a URL instead of normal Text.

Imagine a text file on a website, for example. If you specify the URL as www.example.com/test.txt then Chansel will import the text within that text file when you go to *Show All* mode. (Web channels also work in *Wizard mode*, of course).

REST web service URLs often don't specify a file, but they do have a URL that returns text that can be imported into Chansel via a Web Channel.

An interesting experiment to try is: put in a genuine Web page URL into a Web Channel, then go to *Show All* mode. Chansel will pull in the page “source” code of that web page.

If Chansel cannot connect to the Web Service, then after a short time-out it will show an error message in place of the text that was supposed to have been imported.

4.2.4 Image Channels

Image Channels allow you to replace tags with images. An Image Channel work similarly to a Text Channel except that, in the *Channel To Add* dialog in *Edit Mode* you can browse for an image file on your computer's hard drive by clicking the “*Select Image*” button.

Chansel only displays the file path to the image, not the image itself. When you substitute the Image Channel path, the file path is shown in the Document Pane. When you then save your document to a file, Chansel will use the path to the image file to replace instances of the Tag with that image.

Actually, the last sentence is not quite true because image replacement works slightly differently from normal text replacement. If a paragraph contains text after the tag associated with an image channel, then Chansel will add the image associated with the tag to the end of the paragraph.

It is possible to have more than one image per paragraph. If more than one image tag is present in a paragraph, Chansel appends all the respective images.

One good way to write an image tag in your word processor is to centre it, with no text either side of the tag. Then the image will replace that entire tag, resulting in a neatly centred image in the document when the document is opened and saved in Chansel.

At time of writing Chansel supports Image Channels for Microsoft Docx format files.

4.3 Tag Markers

Markers are snippets of text, usually comprising symbols, that are used to distinguish Tags from normal text. In the sections above so far, Markers have been “[[” and “]]”, which are the default Markers of Chansel. For example:

“Hello *[[name]]*.”

In most cases, that's *all* you need to know about Tag Markers. However the following section includes some advanced Tag Markers features.

4.3.1 Defining Tag Markers

The default Tag Markers can optionally be changed by editing a simple text file that contains them, which exists in the same folder (or directory) as the Chansel installation. The file is called: *markers-pairs.properties*.

The default Markers, *[[* and *]]* are equivalent to this entry in the file:



```
marker.open=[[  
marker.close=]]
```

You can change the Tag Markers default. For example by editing the file to:

```
marker.open=<  
marker.close=>
```

In that case, Tags would match contents within “<” and “>” , for example, document text containing the phrase: “please enter your <name> and <address>” would cause Chansel to show the corresponding Tags: *name* and *address*.

4.3.2 Multiple Tag Markers

Chansel allows you to define more than one pair of Markers. This allows Tags to be categorised within a document, so you can use Chansel to edit one set of markers at a time. This is a good way of filtering tags.

Filtering might be useful for one person or for multiple document editors. Each person can work with a set or subset of Tags.

You can edit the file to show these example Markers pairs:

```
marker.open=[[  
marker.close=]]  
marker.open=<  
marker.close=>  
marker.open=hello  
marker.close=goodbye
```

Notice that as well as symbols we can theoretically use actual *words* for markers, as shown in the bottom pair of Markers. This is not recommended though as it could make life very confusing.

4.3.3 Replacing Unmarked Words

You can use an Open Marker to replace a word that has no markers that *surround* it. In our markers file (see above), what happens if we miss out a *Close* Marker? Then the *Open Marker* becomes the *Tag* itself.

In the example above, if we had this entry in the Markers properties file:

```
marker.open=hello
```

There is *no* corresponding *marker.close* entry. Here the Tag would simply be: “*hello*”.

This is a way to substitute some text in a document without the need to surround that text with a Marker pair. These open markers without a close twin should only be defined at the bottom of the markers properties file.

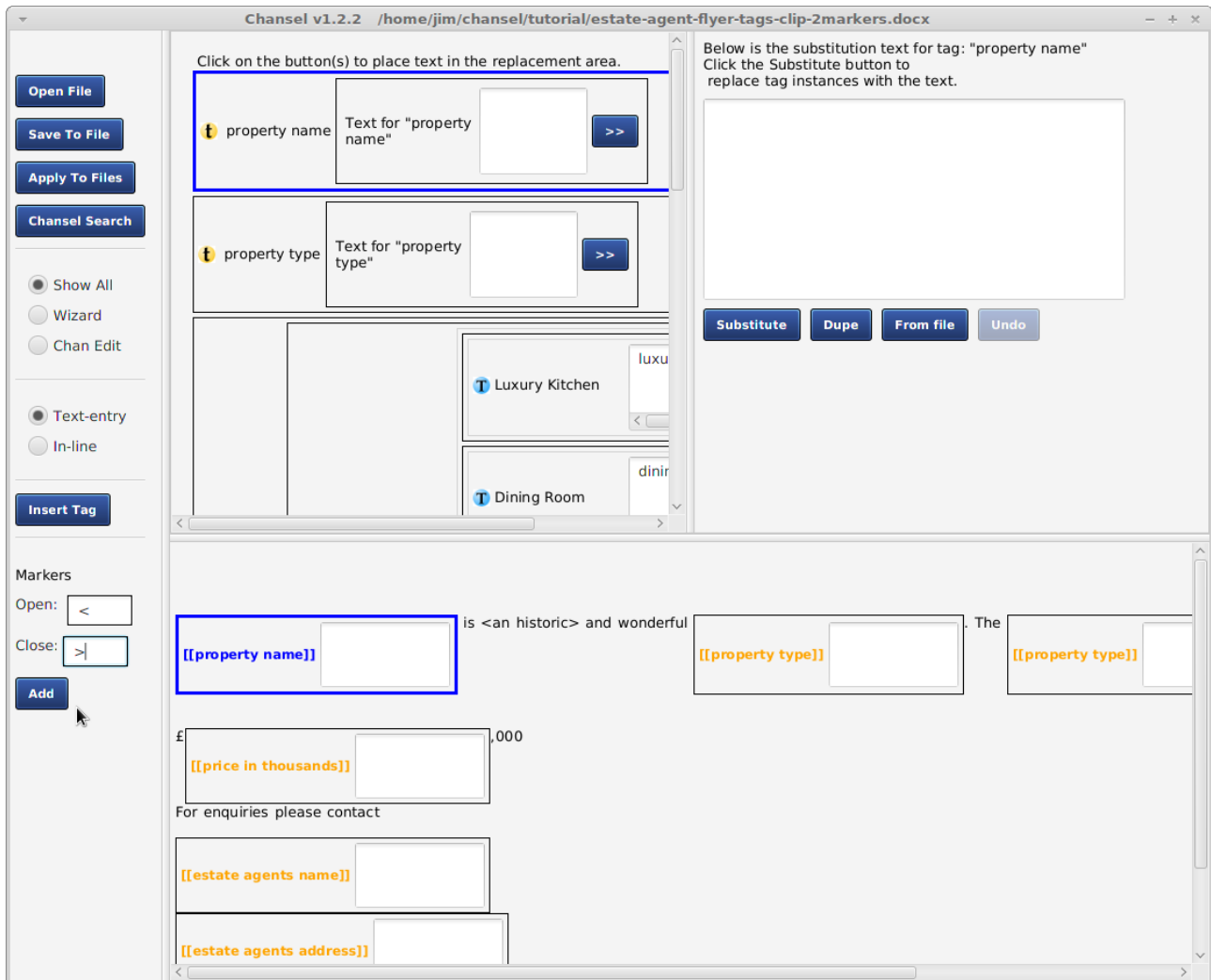
This is a useful feature but should be used with care (keep document back-ups!) as it can be used to replace ALL instances of the word you have defined in the marker.open variable.

If in doubt, do not use this feature.



4.3.4 Tag Markers Via the Graphical User Interface

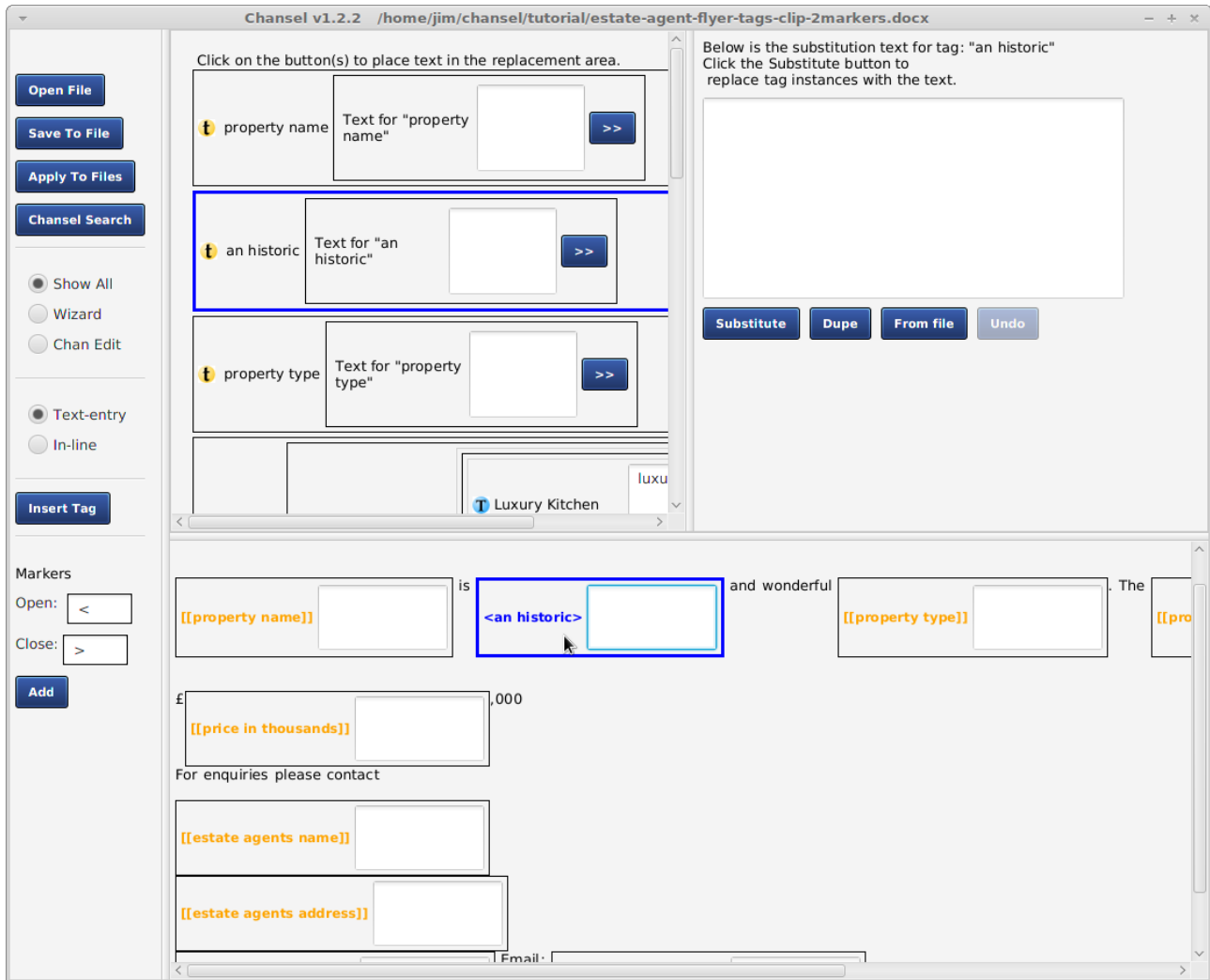
Extra Tag Markers can be entered in the Chansel user interface. Note that these are *temporary* Tag Markers, i.e. they are not persisted after you close Chansel. **To make Tag Markers permanent between sessions, enter them in the Markers properties file** (as is described above).



In this screen-shot, in the Document Pane, the first sentence of document text is: "[[property name]] is <an historic> and wonderful [[property type]]". Chansel correctly does not recognise "<an historic>" as a tag, but we can tell it to.

In the Markers text boxes, lower far left, in the "Open" text box we have typed "<" and in the Close text box, we have typed ">".

Next click the "Add" button, lower far left.

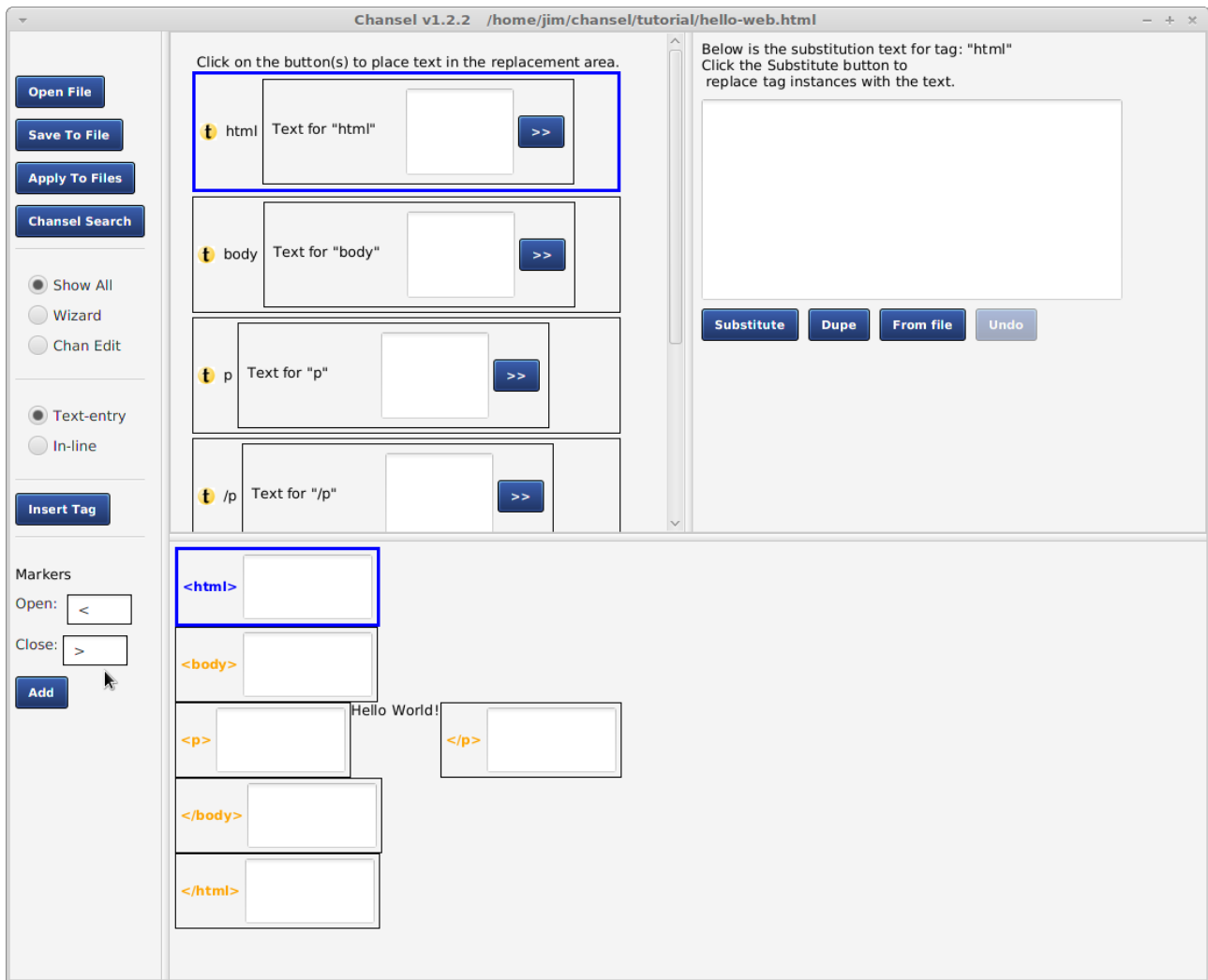


A new tag, `<an historic>`, has been created, as shown. (If you entered, as another example, “For” in the Open text box and “please” in the Close text box, then you would see “enquiries” *also* appear as a tag.)

Another example: if you were to open a file containing web page source code, such as this simple web page source code:

```
<html>
<body>
<p>Hello World!</p>
</body>
</html>
```

Then Chansel, with “<” and “>” as markers, would show you some HTML tags as Chansel tags, like this:



These GUI-defined (lower far left) text markers persist until you close Chansel, so if you wish to *remove* the new markers, simply close and re-open Chansel (saving your work first). As mentioned, to make new Tag Markers permanent between sessions, enter them in the Markers properties file (as is described in a previous section).

Summary: Chansel allows you to use multiple marker pairs. This can provide flexibility. For example, you could have one person working with one set of marker pairs only, and another person working with different marker pairs. Or, in the GUI, they are simply a convenient way of creating Tags on the fly.

4.3.5 Another Find And Replace Technique

You might find this trick useful on occasion. If you place some text in the Markers “Open” text box, and keep the “Close” text box empty and click the “Add” button then something neat happens. Chansel will, for the text in the “Open” text box, create a new *Tag*.

This feature is a convenient way to perform a case sensitive, global find and replace in a document. For example, by typing “Hello” into the “Open” text box, as described above, you can replace *all* instances of “Hello” (with a capital H) in the document. This is because Chansel will create a new



Tag called “Hello”.

If you wish to *remove* the new tags created in this way, close and re-open Chansel (saving your work first).

5 Advanced Topics For Power Users

5.1 Chansel SQL Database

You usually do not need to be concerned with the Chansel Database. The Chansel database stores the channels that you create in Chansel Edit Mode. By default Chansel uses a database on the same computer. However, different instances of Chansel running on different computers can share a common database, which allows different users to share the same Channels. Chansel supports the PostgreSQL and H2 databases. We recommend using PostgreSQL if the database is shared between different users.

The database settings are modifiable via the Chansel properties file. These are the sections to set in the preferences.properties file. Use the # character to comment out the database you do not wish to use.

```
# H2 Database config
db.driver=org.h2.Driver
db.name=jdbc:h2:~/chansel
db.user=sa
db.password=
```

5.2 Chansel Big Data Repository

You usually do not need to be concerned with the Chansel data store but its settings are modifiable via the Chansel preferences properties file. These allow you to control things like what gets saved to the data store, or you can even disable it.

```
# If this is set to false, mongodb is not used for anything, no files and
# document text will be saved. There will be no searching either.
bigdata.do-use-mongodb=true
# Saves copies of opened / imported / saved physical files in mongodb.
bigdata.do-save-files=true
# Chansel to be run in Search mode on start-up
bigdata.query-mode=false

# Mongo NoSQL data repository config
mongodb.server=127.0.0.1
mongodb.port=27017
mongodb.db=chansel
```

For more information, refer to the Chansel Search User Manual, which is a sister manual to this one and is available via our website.

5.3 Summary

Your feedback via our website would be really useful. We wish you success in Automating Your Documents and more!



5.4 Web, Downloads and Contact Us

Our website: www.chanseldoc.com

There you can find:

- Chansel demo download
 - <http://chanseldoc.com/chansel-downloads/Chansel-Demo.exe>
- Chansel full version
 - <http://chanseldoc.com/product/chansel>
- Our contact form and details
 - <http://chanseldoc.com/contact-us>
- The Chansel Search User Manual
 - <http://chanseldoc.com/chansel-downloads/Chansel-Doc-Search-User-Guide.pdf>
- FAQs, which have additional information
 - <http://chanseldoc.com/faq>